

Employee Post-Travel Disclosure of Travel Expenses

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Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The original *Employee Pre-Travel Authorization* (Form RE-1), AND
☒ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Pew Charitable Trusts

Travel date(s): Sept. 13-15, 2019

Name of accompanying family member (if any): Chris Carr

Relationship to Traveler: ☒ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$0.00	\$268	\$88	
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached

10/2/19
(Date)

JOAN K. CARR
(Printed name of traveler)

Joan K Carr
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

OCT 2, 2019
(Date)

[Signature]
(Signature of Supervising Senator/Officer)

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Joan K. Carr

Employing Office/Committee: U.S. Senator Johnny Isakson

Private Sponsor(s) (list all): Pew Charitable Trusts

Travel date(s): September 13-15, 2019

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): Annapolis, MD

Explain how this trip is specifically connected to the traveler's official or representational duties:

This is a management and leadership conference for Senate Chiefs of Staff and will help me fulfill my managerial role as chief of staff to Senator Johnny Isakson.

Name of accompanying family member (if any): Chris Carr

Relationship to Employee: ☒ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

8-12-19
(Date)

Joan K Carr
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Johnny Isakson hereby authorize Joan K. Carr
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☒

8-12-19
(Date)

[Signature]
(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
2. Description of the trip: Senate Chiefs of Staff Management and Leadership Conference
3. Dates of travel: September 13-15, 2019
4. Place of travel: Annapolis, MD
5. Name and title of Senate invitees: Chiefs of Staff (see attached list)
6. I *certify* that the trip fits one of the following categories:
 - ☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR**
 - ☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND**
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND**
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

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☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

- 12. Briefly describe the role of each sponsor in organizing and conducting the trip:**

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="checked" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$60/roundtrip	\$268	\$115.50	

This trip has been arranged specifically with regard to congressional participation.

Annapolis was selected due to its close proximity to Washington, DC and its historical significance.

The Historic Inns of Annapolis, 58 State Cir, Annapolis, MD 21401.

The Historic Inns can provide the necessary meeting space for the planned seminars and can provide the required number of guest rooms to accommodate the group.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are at the federal per diem rate for Annapolis, MD.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Roundtrip transportation to Annapolis will be provided via coach charter buses.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Tamera Luzzatto

Name and Title: Tamera Luzzatto

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, Washington, DC, 20004

Telephone Number: (202) 552-2000

Fax Number: (202) 552-2299

E-mail Address: tluzzatto@pewtrusts.org

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15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.



Conference Schedule

2:30pm **Depart Dirksen via buses**

3:30-4:30pm Maryland State House – Greeting by Senator Ben Cardin
The oldest American state house in continuous legislative use, dating to 1779, and the U.S. Capitol from November 26, 1783, to August 19, 1784. Senator Cardin will welcome chiefs to his state capital and speak about his legislative experiences working across the aisle.

4:30pm Walk to the Historic Inns of Annapolis.
Luggage retrieval and hotel check-in.

6:00-8:00pm Dinner – Governor’s Mansion with visit by Governor and Mrs. Hogan.

Governor Lawrence J. Hogan, Jr. was sworn in as the 62nd governor of the State of Maryland on January 21, 2015. In 2018, he was re-elected to a second four-year term. Maryland’s first lady is Yumi Hogan, a first-generation Korean-American, artist and teacher. Governor Hogan will address his challenges and successes leading a politically-divided state government.

8:30-9:30am Breakfast at your leisure, Calvert House, Historic Inns

9:30-11:00am **Amy Mitchell, Pew Research Center**
Americans' Views of Their Local News.
With an informed citizenry being essential to an effective democracy, where Americans get their news and their trust in those sources is critical. While much attention is paid to national cable news, a significant number of Americans still rely on local sources for news and information. Amy Mitchell will discuss Pew's recent survey of 34,897 adults on their views of local news and the implications for policymakers.

11:00am-11:30am Break

11:30am-1:00pm Lunch
Captain Thomas Buchanan, 88th Commandant of
Midshipmen, United States Naval Academy
 Commandant Buchanan will provide chiefs with an overview of the Academy's mission and walk through the four-year cycle of a Midshipman. Because Senators are given the opportunity to make nominations, he will also provide insights into the qualities sought by the Academy in the admissions process.

1:15-2:45pm **Professor Joanne Freeman (Yale University)**
The Field of Blood: Violence in Congress and the Road to Civil War.
Professor Freeman recovers the long-lost story of physical violence on the floor of the U.S. Congress. Drawing on an extraordinary range of sources, she shows that the Capitol was rife with conflict in the decades before the Civil War. Professor Freeman will bring historical context and insight to today's partisan and factional challenges in Congress.

2:45-3:00pm **Break**

3:00-4:30pm **David Pogue (The New York Times and CBS Sunday Morning)**
A.I., Robotics, and America in 2050.
From 2000 to 2013, David Pogue was the New York Times weekly tech columnist. After a five-year detour to Yahoo Finance, he's now he's back at the Times, writing the "Crowdwise" feature for the "Smarter Living" section. He's a four-time Emmy winner for his stories on "CBS Sunday Morning," and a host of 17 science specials on "NOVA" on PBS. David will talk about the latest advances in artificial intelligence and robotics and the implications for policy makers, the U.S. economy, government, and society as a whole.

6:30-8:00pm

Dinner

**Keynote Speaker – Derrick Wang, composer,
“Scalia/Ginsburg”**
(U.S. Naval Academy Officers Club)

Derrick Wang serves on the faculty of the Peabody Conservatory of The Johns Hopkins University, where he designs and teaches interdisciplinary courses on music and law and lectures on the power of the arts to transcend political divides. Derrick will speak about the unexpected and unique bipartisan relationship between Supreme Court Justices Antonin Scalia and Ruth Bader Ginsburg centered around their shared appreciation for opera and lessons which can be learned and applied to the legislative branch. He will also share a few selections from his opera, “Scalia/Ginsburg” which was written using the actual words and opinions of the two justices.

Sunday, September 15, 2019

8:00-9:30am	Breakfast at your leisure, Calvert House, Historic Inns - Bag Call
9:30-11:30am	Ira Chaleff <i>The Courageous Chief of Staff: The Art of Providing Guidance and Feedback to the Senator</i> Ira Chaleff, Chairman Emeritus of The Congressional Management Foundation, and author of the award-winning book "The Courageous Follower: Standing Up To and For Our Leaders", will do a reprise of the well-received talk he gave at the 2009 Chiefs of Staff conference. While each Senator is unique, as is the relationship with the Chief, there are certain commonalities that occur in the exercise of power. These require close advisors to use courage and skill to minimize blind spots and maximize success. Ira will examine these with the chiefs and offer approaches to add to the existing tool kits the chiefs have developed.
12:00pm	Pick up box lunches
12:15pm	Buses depart
1:30pm	Arrive Capitol Hill

2019 Bipartisan Senate Chiefs of Staff Conference
September 13-15, 2019
List of Invited Staff

First Name	Last Name	Senate Office
Steve	Abbott	Sen. Susan M. Collins
Michelle	Altman	Sen. James P. Lankford
Michelle	Barlow Richardson	Sen. Roger F. Wicker
Allyson	Bell	Sen. Mike Lee
Reynaldo	Benitez	Sen. Catherine M. Cortez Masto
Sarah	Benzing	Sen. Sherrod C. Brown
Cassie	Bladow	Sen. John H. Hoeven III
Tony	Blando	Sen. Ron H. Johnson
Daniel	Brandt	Sen. Pat J. Toomey
Joe	Britton	Sen. Martin T. Heinrich
Brennen	Britton	Sen. Jerry Moran
Joel	Brubaker	Sen. Shelley Moore Capito
Jami	Burgess	Sen. Maria Cantwell
Larry	Burton	Sen. Dan S. Sullivan
Neil	Campbell	Sen. Jack F. Reed
Joi	Chaney	Sen. Kirsten E. Gillibrand
Steve	Chartan	Sen. Ted Cruz
David	Cleary	Sen. Lamar Alexander
Dara	Cohen	Sen. Jacklyn S. Rosen
Caryn	Compton	Sen. Bernie Sanders
John	Connell	Sen. Todd C. Young
Kathleen	Connery Dawe	Sen. Angus S. King Jr.
Jackie	Cottrell	Sen. Pat Roberts
Doug	Coutts	Sen. Tom Cotton
Aaron	Cummings	Sen. Chuck Grassley
Dayne	Cutrell	Sen. Richard C. Shelby
Jonathan	Davidson	Sen. Michael F. Bennet
Jennifer	DeCasper	Sen. Tim E. Scott
J.P.	Dowd	Sen. Patrick J. Leahy
Eric	Einhorn	Sen. Brian E. Schatz
Kaitlin	Fahey	Sen. Tammy Duckworth
Eric	Feldman	Sen. Gary C. Peters
Charles	Flint	Sen. Marsha Blackburn
Kristen	Gentile	Sen. Bob Casey
Lisa	Goeas	Sen. Joni K. Ernst
Marc	Goldberg	Sen. Maggie Hassan
Samuel	Goodstein	Sen. Sheldon Whitehouse
David	Grannis	Sen. Dianne Feinstein
Dana	Gresham	Sen. Doug Jones
Mark	Gruman	Sen. Kevin J. Cramer

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List of Invited Staff

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First Name	Last Name	Senate Office
Richard	Perry	Sen. Lindsey Graham
Brendon	Plack	Senate Majority Whip
Kyle	Plotkin	Sen. Josh Hawley
James	Quinn	Sen. Bill Cassidy
Sydney	Reed	Sen. Pat Roberts
Karen	Robb	Sen. Chris J. Van Hollen Jr.
Preston	Robinson	Sen. John N. Kennedy
Justin	Roth	Sen. Martha E. McSally
Tricia	Russell	Sen. Cory A. Booker
Erin	Sager Vaughn	Sen. Charles E. Schumer
Raymond	Sass	Sen. Ben Sasse
Jacqueline	Schutz Zeckman	Sen. Rick Scott
Sharon	Soderstrom	Senate Majority Leader
Patrick	Souders	Sen. Dick Durbin
Emily	Spain	Sen. Tom R. Carper
Jonathan	Stahler	Sen. Christopher A. Coons
Curtis	Swager	Sen. Cory S. Gardner
Jason	Thielman	Sen. Steve Daines
Fred	Turner	Sen. Bob Menendez
Matt	Van Kuiken	Sen. Debbie A. Stabenow
Matt	Waldrip	Sen. Mitt Romney
Susan	Wheeler	Sen. Mike D. Crapo
Brad	White	Sen. Cindy Hyde-Smith
Megan	Whittemore	Sen. David A. Perdue Jr.
Michael	Zamore	Sen. Jeff A. Merkley

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The Pew Charitable Trusts

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